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Veterinary Services Market for Companion Animals

Summary Report

In 1983, the AVMA sponsored a study on animal ownership and the use of veterinary services by US households.[1] Since that report, there has not been a comprehensive statistical assessment of the veterinary services market for companion animals. Therefore, the AVMA decided to sponsor a new study on companion animal ownership and use of veterinary services. The main objectives were to determine the number of dogs, cats, pet birds, and equine animals owned by US households in 1987, and how often these animals were examined by veterinarians, to estimate 1987 household expenditures for veterinary care, and to assess market trends from 1983 to 1987.

To achieve these objectives, a mail questionnaire was designed with questions regarding ownership of pets and horses, and number of times they were examined by a veterinarian in 1987. Other questions were included to identify household expenditures for veterinary services and products. In addition, households were asked if they had a veterinarian who they would normally call for veterinary health care, why they first chose this veterinarian, and how satisfied they were with the service received from their veterinarian. The questionnaire was mailed to a nationally representative sample of 40,000 US households in March 1988. The number returned was 29,535 (74%).

Companion animal ownership

Statistics on companion animal ownership (Table 1) show the percentage of households that owned each animal species, as well as the average number owned per household. At the end of 1987, more households owned a dog than a cat. However, the cat population exceeded the dog population because households owned more cats on average. In comparison, the percentages of households owning either pet birds or horses were smaller, and the respective populations thus were smaller.

When compared with the 1983 study on veterinary services, several important changes have occurred. For one, the percentage of households owning dogs has declined. In 1983, 42.5% of households owned a dog, versus 38.2% in 1987. However, the percentage of cat-owning households increased from 28.4% in 1983 to 30.5% in 1987. Therefore, cat ownership has grown in popularity, while dog ownership has declined. Horse ownership has remained relatively stable since 1983. For example, the percentage of households owning horses was 2.8% in 1983 and 1987. However, the average number of horses owned decreased from 3.0 to 2.6 horses, and this contributed to a slight decrease in the horse population. The percentage of bird-owning households increased from 5.0% to 5.7%.

Expenditures for and use of veterinary services

The total 1987 expenditures for companion animal veterinary care was an estimated $4,987,000,000. As shown in Table 2, over half of this was spent on dogs, and almost a third was spent on cats. Relatively less was spent on horses, pet birds, and other species of household pets. In the 1983 report on veterinary services, companion animal expenditures were estimated to be $3,796,000,000. Even though the 1983 and 1987

Table 1—Companion animal ownership and population estimates

	Dogs	Cats	Pet birds	Horses
Percentage of households owning animal on 12/31/87	38.2%	30.5%	5.7%	2.8%
Average number owned per household	1.5	2.0	2.5	2.6
Estimated population (million)	52.359	54.583	12.895	6.597

Table 2—Estimated 1987 expenditures for veterinary care of companion animals

Species	1987 Expenditures (billions)	% of total
Dogs	$3.012	60.4
Cats	1.573	31.5
Horses	0.330	6.6
Birds and other pets	0.072	1.5
Total	$4.987	

Prepared by C. Michael Troutman, PhD, Charles Charles Research Group, Overland Park, Kan. First in a series of 5 synopses from the entire report, which became available Sept 15 (see *JAVMA*, Oct 1, 1988, p 765).

Table 3—Percentages of households that obtained veterinary care, 1987 and 1983

Type of animal	1987 (%)	1983 (%)*
Dog	77.6	73.6
Cat	59.5	47.2
Pet bird	7.6	7.5
Horse	47.4	42.6

*In the 1983 study, households were asked about their use of veterinary services during the period May 1982 to May 1983.

expenditures are not statistically comparable, the results suggest a substantial increase in veterinary service expenditures.

The percentages of owners obtaining veterinary care during 1987 are shown in Table 3. Among dog-owning households, almost 78% had a dog examined and/or treated by a veterinarian. This is a slight but statistically significant increase over the corresponding percentage from the 1983 study. A more dramatic increase is evident with cat-owning households. The percentage of these households that obtained veterinary care increased from about 47% to just under 60%. This is a highly significant increase in households obtaining feline veterinary care, and it may reflect public and private efforts to stimulate interest in feline health care needs.

Table 3 also shows that a small percentage of pet bird owners obtained veterinary care in 1987, and this percentage was almost the same as in 1983. The percentage of horse owners who obtained veterinary care increased; however, over half did not obtain any veterinary care in 1987.

Owners were asked to indicate the services provided when they last had their pet or horse examined by a veterinarian. These results are shown in Table 4. The most common service was vaccination, mentioned by 65%. Another frequent service was physical examination (53%). Given the nature of these two services, it appears that a high percentage of owners obtained preventive health care services when they last visited their veterinarian.

Similar results were reported in the 1983 study, which showed high percentages of owners obtaining preventive care. Some services did increase significantly since the previous study. For example, in the 1983 report, only 2.8% mentioned "foods and diet aids," whereas 10.3% mentioned "foods and vitamins" in 1987. Additionally, dentistry services increased from 2.2 to 5.2%. Although dentistry and nutritional services are not provided as frequently as other services, their importance has increased over the past few years.

Table 4—Veterinary services provided when veterinarian last examined/treated animal

Service	% Owners
Vaccination	65.2
Physical examination	52.7
Drugs/medicine	42.5
Lab tests	19.6
Emergency care	17.4
Neuter/spay	16.1
Flea/tick products	16.1
Foods/vitamins	10.3
Grooming/boarding	8.4
Hospitalization	6.6
Other surgery	6.4
Dental care	5.2
Euthanasia	4.1
Others	1.2
Total*	271.8%

*Total indicates that average number of services provided was 2.7.

Factors influencing consumption of veterinary services

When asked if they had a regular veterinarian who they would normally contact if their pets or horses needed health care, 84% of owners indicated that they did. Dog, cat, and horse owners were similar in that the percentages who said they have a regular veterinarian exceeded 80%. For example, 83% of horse owners indicated that they have a regular veterinarian, although many of them did not obtain equine veterinary care in 1987. Therefore, a high percentage of companion animal owners believe that they have a veterinarian for their animals.

The key reason why companion animal owners selected their veterinarian was attributable to the location of the veterinary clinic. Nearly two thirds of owners identified convenient location as a factor in the selection process. In addition, 2 of every 5 owners mentioned the recommendation of a friend and/or reasonable fees as reasons for choosing their veterinarian. Another factor for a third of owners was convenient hours. Few owners identified yellow-pages listings, outdoor clinic signs, or other forms of advertising as factors in selecting their veterinarian. Only 5% of owners, for example, mentioned yellow-pages listing. This suggests yellow-pages advertising may not be effective for attracting new clients. However, outdoor clinic signs, yellow-pages advertising, and other forms of advertising may have helped some owners learn about a clinic's location or hours.

Companion animal owners were asked to rate their level of satisfaction with the veterinary care they received when their pet or horse was last examined by a veterinarian. Ratings were made on a 5-point scale, with "extremely satisfied" being 5, and "extremely dissatisfied" being 1. Satisfaction ratings were consistently high for all owners. In total, 55% indicated they were extremely satisfied with the veterinary care received, and 24% rated their satisfaction at 4, which was one point below extremely satisfied. Similarly high levels of satisfaction were observed among cat owners, horse owners, and others who did not obtain veterinary care during 1987. Conversely, 6% indicated they were extremely dissatisfied (rating 1), and another 5% expressed moderate dissatisfaction. Despite the fact that a few owners were not satisfied with their last veterinary visit, the overwhelming majority of owners were highly satisfied with veterinary care received.

A related question asked owners where else

they went for "professional health care services, advice, special diets, or medications." Over 60% did not identify another source for these services and products. Among those who did use another source, pet stores were mentioned most often, followed by feed/farm store and grooming shop. Two of 10 owners identified pet stores. As a separate group, pet bird owners were much more likely to identify a pet store as an alternative source; almost 50% of these owners went to a pet shop. Feed/farm stores were used by 1 of 10 owners. But, among horse owners, over 50% went to a feed/farm store, and another 20% went to a farrier.

These results show that many pet and horse owners will shop non-veterinary channels for animal health care services and products. Although the results are not clear on this point, owners may shop these non-veterinary channels primarily for animal health products (eg, flea/tick products, vitamins, wormers) rather than for professional advice.

Implications of findings

This research confirms important national trends in pet ownership preferences. Those trends are a decline in dog ownership and an increase in cat ownership. The Pet Food Institute has published data showing similar trends.[2]

If these trends continue, they will have important economic ramifications for small animal practice. Traditionally, cats have received less veterinary care than dogs. Even though cat owners' use of veterinary services increased in 1987, their total 1987 expenditures for feline veterinary care were about half of the canine expenditures. Therefore, these trends will need to be watched carefully in the coming years.

The research also shows that a higher percentage of cat owners obtained veterinary care in 1987 than in 1983. This increase probably is the result of efforts to stimulate interest in feline health care. Although the increase cannot be tied to a specific marketing or educational program, it illustrates the potential impact from marketing feline health care. Since cat ownership seems to be increasing, marketing feline health care will become even more important. Ideally, cat owners' use of veterinary services would increase to levels that dog owners now show.

Another compelling result is the high percentage of owners who say they have a regular veterinarian. Furthermore, a high percentage say they were satisfied with their veterinarian on the last visit. One implication of these results is that most companion animal owners have an attachment to a veterinarian. This means there are few unattached owners who are looking for a new veterinarian. Instead, most owners are likely to return to their regular veterinarian the next time they need veterinary care.

Another implication from these results is that a high percentage of owners apparently have obtained veterinary care at some point in the past. However, the last veterinary visit for many was prior to 1987. Horse owners serve as an example. About half of this group did not obtain veterinary care in 1987. At the same time, 8 of 10 horse owners have a regular veterinarian. Many probably had their horses examined in 1986 or 1985. Therefore, these horse owners as well as some dog and cat owners do not obtain veterinary care on an annual basis. Instead, they have more extended periods between veterinary visits.

Since many companion animal owners consume relatively less veterinary care, an ongoing challenge for the veterinary profession will be to encourage more frequent use of veterinary care. From a practitioner's point of view, this means converting "B" clients to "A" clients, and "C" clients to "B" clients. Additionally, it means changing owner perceptions about the need for and benefits of more regular veterinary care, especially for cats, horses, and pet birds. To illustrate, consider those who own a dog and a cat. Apparently, they believe that cats need less veterinary care than dogs. On average, these "dual" pet households had each cat examined 0.75 times in 1987, whereas the average for each dog was 1.33 times. This discrepancy points to the need for a continuing emphasis on feline veterinary care in marketing and public education efforts. Similarly, marketing and public education efforts targeted at horse owners (or pet bird owners) should focus on the benefits of more regular equine veterinary care. These efforts might lead to increased use of veterinary services among horse owners, as was observed with cat owners.

[1]Charles, Charles & Associates. The veterinary services market. Schaumburg, Ill: American Veterinary Medical Association, 1983.

[2]Pet Food Institute Fact Sheet, 1987. Washington, DC: Pet Food Institute, 1987.